



EPN Gatwick, UK
**“Facilitating Change: Experience and challenges
for the humanitarian sector”**

SUMMARY REPORT

Wednesday 13th to Friday 15th May 2009

at

Gatwick Worth Hotel

Report by Catherine Elliott

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A full report is available on the EPN website at www.epn.peopleinaid.org

Further details of the conference, including: an overview of masterclass and case study sessions, speaker biographies and the relationship between EPN and People In Aid are available in the Gatwick Conference Briefing Pack at www.epn.peopleinaid.org.

Executive Summary

Summary of key learning points

- Peer Learning is a powerful tool for sharing learning and building networks and can be used to surface real-time issues and questions around organisational change
- An organisation that is good at change is one that learns and manages knowledge well
- Different people will respond differently to change: identifying the various roles played by individuals can help ensure an effective process
- A number of key elements should be in place to improve the chance of a successful change process e.g. a clear vision; support by senior/influential managers; recognition/reward for change behaviour
- Communication is fundamental to an effective change process
- The term Change Management is a misnomer – it implies that change is somehow abnormal. Organisations need to focus their efforts on coaching for adaptation in an ever-changing world
- We need to push for earlier HR involvement in change processes initiated by other departments/teams

EPN is an initiative which brings together HR practitioners and line managers to network and discuss issues related to the recruitment, retention and development of staff involved in emergency situations. The EPN conferences provide a unique opportunity for HR professionals to spend time with their peers, to share discussions on issues they face in daily practice as well as issues from the broader humanitarian sector that impact on the HR function.

Following guidance from last year's discussion, the feedback forms from participants and the evaluation of EPN Istanbul, a decision was made to focus 2009's conference on 'facilitating change' – a topic at the heart of humanitarianism, both for staff and people affected by disasters. The topic was felt to be an important one as there are few organisations in the sector that have not or are not experiencing significant change, be it driven externally by unanticipated events (e.g. tsunami, credit crunch) or by internal events such as the appointment of a new CEO or an office relocation/restructure. Such change invariably will have implications for HR practitioners whether or not they have felt included in shaping or driving any change initiative.

This year's conference saw a marked change in look and feel, with an agenda which sought to emphasise participative approaches and offer many formal and informal opportunities for participants to engage with peers. The agenda was deliberately tailored so as to elicit participants' experiences of change early on in the conference and for these experiences to shape the rest of the agenda ensuring that all those who attended got the most out of the event. The goal was to introduce participants to processes, tools and approaches which they could then take directly back to their workplace to help them be better change agents.

The participative approach was immediately apparent from day one which centred on a Peer Learning process, a powerful tool for sharing and learning which was used to surface real-time issues and questions around organisational change in the sector. On the second morning, themes drawn out from the Peer Learning were absorbed by the day's presenters to ensure they underpinned the entire conference. A series of Masterclasses run by presenters who drew on both established theory and their personal and professional experiences provided participants with the practical tools, theory, frameworks and first-hand experiences to take back into their workplace – from the foundations of knowledge management which are fundamental to effective change in organisations to how storytelling can offer a helpful tool for leaders to engage the hands, hearts and minds of those undergoing any change process. Case studies offered participants the chance to hear their peers' first-hand accounts of undergoing change and the invaluable lessons they have learned from this, including the pros and cons of a truly transparent change process and the challenges of building and maintaining ownership of the change process.

An inspirational keynote address gave participants a refreshing perspective and plenty of food for thought on the role of humanitarian organisations in an ever-changing external environment and a final group exercise

offered first-hand experience of the various psycho-dynamics one may expect to undergo when embarking on a change process.

With the focus being on the involvement of people in change, the conference also offered some fundamental insights into what HR can and perhaps should be contributing to any change initiative. It was noted early on in the conference, from experiences shared in the Peer Learning process and later touched upon by some of the presenters, that all too often HR is not fully consulted by those initiating change and by consequence typically plays a more reactive than proactive role – or any involvement is limited to the transactional level. There was a strong sense that HR should lobby for involvement at an early stage and at a strategic level to ensure the organisation can fully embrace the HR function's ability to influence and engage with leaders, managers and the employee body. Furthermore, whilst it is quite common for external consultants to be brought in to facilitate a change initiative there was a sense that this may not always be strictly necessary as in some organisations HR is perfectly placed to act in an internal consultancy role e.g. where they possess both the required technical expertise and are trusted by employees. Indeed this role can also exist in close collaboration with any external consultant who may be hired, with HR offering a vital 2-way feedback mechanism to communicate with the employee body and elicit their reactions to the change process.

There was strong appreciation from participants for the number of tools and frameworks which were introduced by the various experts to help ensure more effective HR involvement in the design of organisational change and to enable HR professionals to lead and support these change processes. There was also a strong message from Kate Gilmore that HR can do more to harness the adaptability of employees and to release the people power which exists in any organisation by focussing energies on 'liberating the talent' of its people. Furthermore, HR if involved at a strategic level has a better chance of encouraging managers to be future-led as opposed to memory-led: something she feels is essential for organisations given the pace of change in the external environment in which organisations exist.

The quotes below further illustrate some of the highlights and key points in the conference:

About the conference:

“My big take-away was realising that everyone was dealing with the same thing.”

“I am now equipped with tools to understand the emotional mechanisms beyond change and will try to apply them myself and to others to support the process.”

“I have learnt a great deal that I am sure will be very useful in my role as change agent.”

“I feel a lot more confident now in my personal approach to change as well as in supporting management and colleagues.”

“It has been a privilege to share, learn, affirm and listen.”

“We’ve found really good tools – I feel confident and able to deal with change.”

About Peer Learning:

“Its strength is that it transforms problem solving away from agony aunt columns/bitching by the water cooler to something practical – it is the structure that allows this.”

“The process forces you not to digress but to focus on the real issue.”

“It’s very powerful: I got an important insight today which is testament to the work of the group.”

“Positive experience, pleasant process.”

About change:

“Change is normal, it’s what life is about: stability is a myth.”

“Change is inevitable – we can’t control it but we can control our reaction to it.”

“Resistance will always happen – it’s not an active thing but a human response which is necessary for consistency and to keep organisations as organisations.”

“Everyone thinks of changing the world, but no one thinks of changing himself.”

“It is an anomaly to talk about change management: change is a slippery piece of soap.”

“It isn’t our business to know the destination but to leave the departure point.”

“We don’t exist to survive, we exist to change.”

“By virtue of [the sector] where we work we are the masters of adaptability.”

“As humanitarian organisations we are naturally evolving/changing, we therefore need to tap into this innate adaptability.”

Thanks to Our Donors

EPN is very grateful for the financial support and commitment of a number of agencies who provided funding for the conference. We would like to thank:

British Red Cross; CAFOD; ECB Project; The Management Centre; MSF UK; Oxfam GB; People In Aid; Save The Children UK; World Vision International and Action Contre la Faim.



EPN Gatwick Statistics

Total number of people attending:	59
Total number of participants:	59
Number of guest speakers:	12
Number of agencies represented:	36

Session Reports

Welcome and Introductions

Jonathan Potter – Executive Director, People In Aid

Jonathan opened the session by welcoming participants to the EPN Gatwick conference. He thanked the Steering Group for their expert guidance and input, the funders for their financial support and Katja Pesari for coordinating the event. He expressed thanks to all those who had flown in to attend the conference, in particular those for whom English was not their first language.

Jonathan reminded participants that EPN is a participant-led learning network. This fundamental concept underpins the conference agenda which seeks to allow participants to learn from the experience of others and to ensure this learning be of value to participants as individuals and also to their respective organisations.

The choice of topic for this year, 'facilitating change', was introduced as an area which featured heavily in last year's discussions and feedback. Jonathan handed over to Vicky Cosstick, Convenor/Facilitator, to tell participants a little about her background and to discuss the mandate of EPN Gatwick.

Introduction and Mandate of EPN Gatwick

Vicky Cosstick – EPN Convenor

Vicky introduced herself as an independent consultant and facilitator with 30 years' experience working in change, the last seven of which having been spent in the international NGO sector. As a form of icebreaker and to gain insight into participants' expectations of EPN Gatwick, Vicky asked people to share their biggest hopes and fears/concerns for the next few days of the conference. These included:

Hopes:

- To hear stories and to tell some
- To gain ideas and different ways of doing things
- To learn something to enable me to be more effective in organisational change i.e. 'aha' moments
- To move beyond strategy and gain different ideas about engaging people in change
- To better support people through change
- To hear the stories of things that don't work – providing an open and trusting environment to allow us to share these (we often learn more from the less successful stories)

Fears/Concerns:

- Peer learning is scary – is my story going to be good enough?
- Finding oneself stuck in a conversation with a technical expert/specialist and not being able to follow what they are saying

Initial Framing Concepts and Questions about Change in Organisations

Vicky Cosstick – EPN Convenor

Vicky explained that in her role as facilitator she would seek to guide the process towards the agreed outcomes and to make a 'safe place' for learning. She stressed just how different the format of the conference would be to previous EPNs with a process carefully constructed so as to allow the effective flow of ideas and experiences over the three days. Vicky's desired outcomes for participants were:

- That something will have changed for them personally
- That they will have a clearer idea of how to understand, facilitate and influence change in their organisation.

A framework made up of 4 main approaches to dealing with change was introduced and Vicky explained that successful change initiatives in organisations need to address all four dimensions. Her hope was that the process and content of the conference would address all four approaches.

1. BEHAVIOURAL

Competencies
Skills training
Performance & reward
360 degree

2. COGNITIVE

Business planning
Restructuring
Project cycle management
Visions and objectives

3. PSYCHODYNAMIC

Addressing emotion
Counselling
Surfacing hidden issues
Treating people as adults

4. HUMANISTIC

Values
Organisational learning
Communication and consultation

Vicky left participants with the following questions to bear in mind as they went through the conference:

1. How do you personally feel and react to change in your organisation?
2. What is your role with regard to change in your organisation? And what would you like it to be?
3. Do you believe that change can be managed? In what ways?
4. What is your theory of change? How do you believe change actually happens?
5. What are the drivers for change in your organisation? Where does change come from?

Insights from EPN Nairobi on Facilitating Change

Pamela Mokaya – Director HR and Administration, WWF East Africa

EPN Nairobi was held in March 2009 and was attended by 30 participants including line managers, HR practitioners and those working in operations within local and international NGOs based in Africa. Pamela deemed it to be a very interactive and successful conference which for the first time discussed the same topic as the European EPN, Facilitating Change. Pamela summarised the discussions, which focussed on HR as change agents.

For the full Nairobi Conference Report please refer to: www.epn.peopleinaid.org/files/nairobi09/EPN-IAWG-NAIROBI-2009-Conference-Final-Report.pdf

Peer Learning Process

Vicky Cosstick – EPN Convenor

Peer learning is a powerful tool for sharing learning and building networks. At EPN Gatwick it was also used to surface real-time issues and questions around organisational change in the sector with the intention that going through this process would help participants become more effective change agents in their workplace. It is a very disciplined and structured facilitated exercise which has some similarities to action learning (but is not the same).

For full details of the Peer Learning process please refer to annex D, page 33 of the EPN Gatwick Final Report at www.epn.peopleinaid.org/files/gatwick/default.aspx.

Plenary Reflection on Peer Learning Process

Vicky Cosstick – EPN Convenor

Summary of key learning points about peer learning

- Peer learning is a powerful tool for sharing learning and building networks
- “The strength of the process is that it transforms problem solving away from agony aunt columns/bitching by the water cooler to something practical – it is the structure that allows this”
- As a group becomes more experienced the role of the facilitator becomes unnecessary as they instead ‘self-facilitate’. However, it is important to remember that each part of the process has its role and whilst the structure can be relaxed it should not be lost.

Participants were asked to feed back to the whole group, sharing their experiences of and comments about the peer learning process. *These can be found in Annex E, page 35 of the EPN Gatwick Final Report at www.epn.peopleinaid.org/files/gatwick/default.aspx.*

Feedback from Peer Learning Groups

Vicky Cosstick – EPN Convenor

Vicky led a session in which a member from each peer learning group presented the key issues/questions which arose from the exercise. The idea here was to identify common themes, and for participants and presenters to be continuously aware of these key issues as they moved through the rest of the conference.

A number of participants admitted to feeling a little anxious about embarking on the peer learning process – their main fears being centred on whether their story would be good enough or suit the process, how effectively they would be able to communicate their story in just 6 minutes and uncertainty about just how useful the process would be to them. Having gone through the exercise their reaction was considerably more positive with many citing it as a tiring but very interesting and useful tool which allowed peers to provide practical advice and invaluable insight into their problem in a safe and controlled environment. Many also commented on the atmosphere of trust it created – something that set the scene for the rest of the conference and encouraged wide sharing of ideas and experience. Some participants admitted how difficult they found it to both give and receive affirmation although one described this component as ‘liberating’ and stressed just how much they appreciated being ‘battered up’! Others found it hard not to be able to revisit their story or justify/explain their actions after the initial presentation but soon realised this was unnecessary and that the exercise was not going to necessarily offer any immediate solution. Instead the feedback they received could be taken away and digested/reflected upon in their own time i.e. the problem still remained theirs. Concerns about how the process would work were allayed as after the first ‘round’ it soon became apparent just how straight-forward it was and in a sense the groups almost began to self-facilitate (although they appreciated the importance of maintaining the structure which is so fundamental to the effectiveness of the process).

For a full list of all the solutions/ issues/questions which were fed back please refer to Annex F page 36 of the EPN Gatwick Final Report at www.epn.peopleinaid.org/files/gatwick/default.aspx.

Masterclasses

Participants chose to attend two of four Masterclasses.

Influencing Change: The Power of Storytelling¹

Tony Page – Independent Leadership Consultant & Philip Goodwin, British Council

Summary of key learning points

- Storytelling plays a crucial part in any change process, offering leaders the opportunity to distil experience, build understanding and create new possibilities for the future.
- By encouraging people to step back and ask themselves ‘what’s the story here?’ and engaging their higher faculties/intelligence, individuals will be better able to avoid stress in the change process and make more positive interventions.
- In change what is required is an integrated engagement of hands (action), heart (emotion) and mind (logic) which creates a new shared context that deepens and sustains the change in behaviour, instead of lapsing like so many on-off diets or exercise regimes. This involvement in the change process also moves people from being victims to become active co-creators of change.
- The 3 Circles of Doom, Control and Influence offer individuals a way to express and transform their private story from negative to positive and to rediscover their influence. By openly addressing the various issues contained within each circle when engaging a team member in change, the recovery effect will be achieved.
- *“This is a very powerful tool and I can see that I can use this”* Participant

Tony and Phillip introduced the potential usefulness of storytelling in delivering change which rests upon the opportunity it offers leaders to distil their experience, build understanding and create new possibilities for the future. After an introduction to the potential role of storytelling in a change process and some grounding concepts behind this, participants were given the opportunity to practice storytelling themselves.

Frameworks for Understanding Change

Ian Vale – Senior Management Consultant & Colette Harvey – Management Consultant, The Management Centre

Summary of key learning points

- Often organisations use the wrong leadership/management approach to lead change
- There are five key elements which should feature in any change process: Vision; Competencies; Incentives; Resources; and an Action Plan
- Various models exist to help organisations consider the various roles which are typically involved in a change process e.g. Architect (designs process, shapes vision); Sponsor (signs off, provides weight); Agent (makes it happen, implements change); Participant (takes part i.e. is consulted/engaged); Regulator (sets the rules, creates the framework); and Anarchist (tries to subvert whatever happens, creates difficulties)
- Different individuals will have a different response to change and a different degree of resistance e.g. ‘Champions’ are enthusiastic about change whilst ‘Challengers’ are sceptical and ask difficult but often useful questions
- A successful Change Team requires ‘Challengers’, ‘Converters’ and ‘Chasers’
- *“Sharp, focussed, crystal clear, succinct, relevant, engaging trainers – excellent!”* Participant

¹ For further reading on the role of storytelling and a story of a real merger and change that was multi-national, multi-cultural and difficult (engaging hundreds of staff over 11 countries) please refer to ‘From Hippos to Gazelles: how leaders create leaders’ Philip Goodwin and Tony Page, British Council/Kingsham 2008 (available from www.h2gleadership.com) on which the session was based.

Ian and Colette introduced participants to a number of tools previously used with other NGOs which help analyse, communicate and lead change in a bid to ensure more effective HR involvement in the design of organisational change and to better enable HR professionals to lead and support organisational change processes themselves.

Back to Basics: The Foundations of Effective Organisational Learning²

Paul Whiffen – Knowledge Manager, HM Revenue and Customs

Summary of key learning points

- An organisation that is good at change proactively manages its knowledge as an organisational asset creating a learning organisation for continuous performance improvement
- The Learning Before, During and After model shows how a group or team can learn through structured and facilitated discussions at targeted points in project delivery
- The Learning Cycle illustrates the importance of identifying lessons learned from any activity and ensuring they are applied in the future. This can be done through the use of subject management experts who validate and distil the learning, determining best practice, which can be adopted into corporate standards and training for future projects
- The Knowledge Competency Framework helps an organisation identify which knowledge needs to be managed, so avoiding trying to manage everything and becoming activity led. It helps the organisation recognise which knowledge is strategic, competitive, core and non-core and how each should be managed in support of business delivery
- The 12-element model helps diagnose how well knowledge is flowing around an organisation. The model facilitates identification of where the organisation is learning and where there are gaps, so as to be able to close the gaps and ensure the effective flow of knowledge
- *“Provided very good basic frameworks”* Participant

Paul’s session focussed on 4 models illustrating the key principles which underpin effective Knowledge Management. To use his words, “an organisation that is good at change is one that learns and manages its knowledge well”, therefore an understanding of these models can prove fundamental for anyone involved in an organisation’s change process. The session was carefully constructed so that each model built on the previous one, starting with two tactical models: Learning Before, During and After and The Learning Cycle before moving onto the more strategic Knowledge Competency Framework and 12 Element Model³.

² For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

³ All models are based on Milton, Nick (2005) ‘Knowledge Management for Teams and Projects’ Chandos Publishing

Breakthrough Change in Times of Crisis

Ben Ramalingam – Head of Research and Development, ALNAP & Paul Clarke – Director, Oxford Change Management

Summary of key learning points

- Aid agencies need to have an external orientation and be adaptive in the face of change as they encounter increasing and increasingly interconnected global challenges e.g. climate change, demographic change
- 70% of typical organisational responses to current and emerging contexts fail e.g. downsizing; restructuring; revision of business processes
- Resistance will always happen – it is not an active thing but a natural human response which is necessary for consistency and to keep organisations as organisations
- Successful projects can act to decrease resistance to change by decreasing *unnecessary* uncertainty and increasing individual motivation to change behaviour
- Successful projects also: have a clear necessity/business case; have a clear and compelling vision; leadership support; are led by multi-stakeholder teams with clear roles; have a clear, timed, flexible action plan *with 'quick wins'*; provide recognition / reward for changed behaviour; engage key stakeholders from the outset; and communicate effectively
- *“A stimulating presentation and stimulating ideas”* Participant

Ben and Paul provided the opportunity for participants to explore some of the options for change that are open to humanitarian organisations which are hoping to maintain and improve their effectiveness in the challenging and ever-changing external environment. They then considered why so many of these options, when implemented, typically fail to lead to organisational improvements before identifying practical key actions and essential elements which can help avoid the pitfalls which often derail change initiatives.

Case Studies

Participants chose to join one of four Case Study sessions.

Building Ownership of Change at CAFOD⁴

Barbara Wilson – Director for Organisational Development and Personnel, CAFOD

Summary of key learning points

- HR plays a key role in supporting an organisational change process
- A staff attitude survey can offer valuable insight into employees' experience of and feelings about a change process
- Major change takes a lot of time and effort and should be viewed in the long term
- Support from senior leadership is critical
- Efforts should be made to ensure employees are engaged throughout the change process for which communication is key

Following a period of considerable growth in recent years CAFOD has undergone significant changes in a bid to improve the effectiveness and focus of its humanitarian programmes. Barbara's session focussed predominantly on the implications such change has had predominantly on the HR department as it strives to 'catch up' with the changes that have been occurring across the organisation. Barbara talked about the role of HR in response to these changes which included a review of HR policies; a new HR system; and development of HR strategy. She also shared CAFOD's experience applying for certification by the People In Aid Code of Good Practice as well that of conducting and identifying appropriate action from a staff attitude

⁴ For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

survey, highlighting the advantages and challenges of both exercises and six key lessons learned through the process as a whole.

Building Capacity for Surge at World Vision

John West – Associate Director for Capacity Building, World Vision International

Summary of key learning points

- Training is not building capacity – capacity is the ability to achieve your objectives
- The core problem is not having skills but having the will and commitment
- The key elements to an effective capacity building strategy can be grouped as: Systemic (Structure / Systems / Tools / Resources), Competence (Knowledge / Abilities and Habits) and Esprit (Motivation / Attitudes and Values)

John's presentation focussed on World Vision's challenge to develop a sustainable indigenous solution to the problem of managing surge demands to emergencies in Africa, many of which are chronic. He shared the World Vision Africa Humanitarian and Emergency Affairs Office's 'comprehensive and sustainable' strategy, implemented in 2000 to meet this challenge and talked participants through the capacity building framework and process used by the organisation including important reference to the successes and challenges associated with these.

The Pros & Cons of Complete Transparency: Change at Islamic Relief Worldwide

Willem van Eekelen – Head of Policy and Research, Islamic Relief Worldwide

Summary of key learning points

- A transparent and consultative change process can be a very powerful change mechanism and enabler. It can ensure that changes are substantial and meaningful and have a wide and genuine buy-in amongst colleagues
- In addition to basic requirements such as an intranet, teleconferencing facility etc. a truly transparent and consultative change process also requires 4 other key components: A willingness, from the trustees and the CEO, to be explicit about any boundary conditions there may be and to be ready to discard any hidden agendas; a Change Team that has the energy to live up to constant scrutiny; an elaborate feedback network that spans each part of the organisation to be able to pick up anxiety as soon as it appears; and the senior decision-makers' willingness to take very substantial risks.
- A transparent and consultative change process is an exhausting, intensely time-consuming exercise
- Transparency in a change process has a long-lasting effect. Once people are used to it, it gets to be expected.

To use Willem's own words, "in a best case scenario, a transparent and consultative approach is of great value to a change process. In a worst case scenario, it merely aggravates anxiety." Based on the realities of the 2008–2009 change process at Islamic Relief Worldwide, Willem offered participants a detailed account of his experience leading a change team in a truly transparent and consultative process. This included an invaluable overview of the requirements, risks and limitations related to complete transparently and genuine consultation.

The Challenges of Restructuring: Major Change in WWF – Eastern Africa Regional Programme Office (EARPO)⁵

Pamela Mokaya – Director: HR and Administration, WWF East Africa

Summary of key learning points

- A compelling change story is fundamental to an effective change process
- Change Team members should be selected objectively
- Clear terms of reference for the Change Team
- A communication strategy needs to be developed and those who will lead the communication must be identified
- A change process must be open and transparent to avoid unnecessary gossip

WWF is currently undergoing a major restructure which includes the merging of two major regions: Eastern Africa Regional Programme Office (EARPO) and the Southern Africa Regional Programme Office (SARPO) to form a super hub to be known as Eastern and Southern Africa Regional Programme Office (ESARPO) – the headquarters for which will be based in Nairobi.

Pamela is one of the seven change agents at WWF who have been tasked with facilitating the process and so was perfectly placed to talk participants through the various complexities and challenges involved which included the thorough process used to select a team of appropriate change champions and the challenge of selling the change and managing emotional responses to any such initiative.

Keynote Address & Questions: 'Leading through Turbulence'

Kate Gilmore – Executive Deputy Secretary General, Amnesty International

Summary of key learning points

- The term 'change management' is redundant and implies that change is somehow abnormal. Organisations should instead focus their efforts on coaching for adaptation in an ever-changing world
- Adaptation is a daily process as we as individuals and organisations adapt to the external environment in which we exist
- Managers need to be future-led not memory-led to focus on the future and pace change against the external environment
- HR can do more to release the 'people power' which exists in any organisation by focussing energies on 'liberating talent' of its people
- 90% of organisations fail to execute and track strategy due to 4 key barriers: Vision; Leadership; Resource and People
- NGOs are currently facing a number of challenges related to accountability; leadership; talent; learning; adaptation and impact
- In the humanitarian sector collaboration is more important than competition (brand and niche are not the priority)
- To move forwards an organisation needs to be people-oriented; future-led; have a vision centred on the external world; have a clear direction; align the people it has today with the talent needed tomorrow
- "We don't exist to survive – we exist to change"

⁵For a detailed account of the session please refer to: <http://www.epn.peopleinaid.org/files/gatwick/default.aspx>

Since arriving in her position as Executive Deputy Secretary General at Amnesty International in 2000, Kate has been responsible for broad-ranging organisational change and enabling an overall strategic re-orientation of the organisation's work. She plays a leading role in the global communication of Amnesty International's vision and mission and offered participants a particularly refreshing view of where NGOs fit in the bigger world of change. She argued that rather than manage change – a misnomer in her view which implies change is somehow abnormal – efforts should be focussed on coaching for 'adaptation' in an ever-changing world and that HR can do more to release the 'people power' which exists in any organisation to help accomplish this. Kate also stressed the fundamental importance of ensuring vision, strategy, and actions are 'future-led' as opposed to 'memory-led' and the need for NGOs to focus on a common vision to ensure the existence of 'sustainable individuals in a sustainable society on a sustainable planet'.

Dynamics of Change

Will Campbell – International Management Development Consultant, The Management Centre

Summary of key learning points

- There are 7 psycho-dynamics which individuals may expect to experience in a change process
- A group exercise which provides first-hand experience of these dynamics can be useful for any change team before embarking on a change process
- By anticipating certain reactions to change, strategies for managing these reactions can be put in place

Will led a large group exercise to illustrate the 7 dynamics one may expect to experience in a change process and to give each participant a first-hand experience of these e.g. feeling awkward; focussing on what will have to be sacrificed; feeling alone. He recommended using such an exercise and the ensuing discussion with change teams as fundamental training for the reactions they may expect and how to best respond to these.

Panel & Discussion

Ian Vale – Senior Management Consultant, The Management Centre

Paul Clarke – Director, Oxford Change Management

John West – Associate Director for Capacity Building, World Vision

Barbara Wilson – Director for Organisational Development and Personnel, CAFOD

Pamela Mokaya – Director: HR and Administration, WWF East Africa

Facilitated by Vicky Cosstick – EPN Convenor

A series of questions were put to the panel of experts by participants and the ensuing discussions revealed the following key messages:

1. External consultants are often used by organisations in change initiatives and the experts agreed that this external authority can be useful in that it brings a different perspective; can give the process objectivity and through this legitimacy; and can play an integral role in holding internal representatives to account. However, the panel were also keen to stress that fundamental to the success of any change process is internal leadership and motivation in the form of 'change agents' or 'sponsors of change' within the organisation. These individuals should work closely with any external consultant who is brought into the organisation, a relationship which is particularly important where employees may feel resentment towards the consultant who they believe may simply be prolonging the process so as to keep their job. It was also acknowledged that external consultants are not always necessary if the expertise is available in-house e.g. HR may be able to act in an internal consultancy role where they possess the required technical know-how and are trusted by employees.
2. In a bid to overcome resistance to change it is essential to adopt a tailored approach to communicating the benefits and outcomes of the change to different stakeholders. One panel member also pointed out the often overlooked fact that by default any change process tends to focus on change but that this can in effect be self-defeating i.e. we tend to ignore the 95% of things that stay the same. By contextualising any change and assuring individuals that the organisation's essential values etc. remain the same, a lot of resistance may in fact disappear and instead the organisation can successfully harness people's resilience, toughness and dedication.

3. The panel identified a number of key flags which can indicate that things are going wrong within a change process. These included not keeping to timeframes; missing 'key deliverables' which may indicate change fatigue or obstacles to the process; and activities being shelved which implies that they have not been sold/marketed well and so are not bought into.
4. Each expert offered their key ingredient which would make for a more effective change effort:
 - Communication
 - Plan as much as you can
 - Ensure people have 'the will'
 - Organisations aren't machines – intervene as you would in society
 - Leadership – not power or control but responsibility through enabling
5. There are a number of key elements related to the unique nature of the humanitarian sector/emergency relief organisations which organisations should embrace to help ensure effective change management. These include a) the fact that people really want to do the work therefore as long as any change is linked to a clear purpose resistance should be minimal; b) the strength, conviction and core values held by employees which helps to keep them engaged in any change process; c) that by virtue of where organisations work humanitarian professionals are the masters of adaptability – change is somewhat natural to them.
6. Whilst we may not be able to manage change we can catalyse it by asking the right questions and then provide the framework to capture the reactions we get.

Personal and Group Action Planning

Vicky Cosstick – EPN Convenor & Rachel Houghton – Sector Partnerships Project Manager, Emergency Capacity Building Project

Rachel provided a useful overview of the background and purpose of the ECB Project and an update of where the project is at present.⁶ She then explained the ECB Project was interested in conducting a piece of work on behalf of EPN members in order to better understand and foster the change process in our organisations.

Participants were asked to reflect on all that they had seen, heard and learned in the past few days and in their experiences before the conference, and consider:

1. What gaps there are in terms of current resources which could potentially help support the change process within the humanitarian sector
2. What this 'resource' might look like i.e. a tool; research study; piece of action research.

There were various ideas proposed which included:

1. Common vision for change
2. Business case for staff well-being
3. Toolkit for dealing with emotions in change
4. Research: How to be collaborative without having an identity crisis
5. How to recognise, harness and develop capacity to actively adapt and improve
6. Tools to promote *adaptive* culture/behaviours
7. Action research – what do we learn from field participation about effective organisational 'engagement': who, when and how much?
8. Tool: Review (mapping) mindsets so that people have the right attitude towards change
9. Ten top tips and ten transformational tools
10. Toolkit for managers on change – stories of change highlighting: successes; learning; disappointments; emotional responses; cross cultural reactions and how to manage them
11. Teams: Team recruitment, development, performance etc; tools: mechanisms, piloting/testing, performance liberating (use ECB1 into ECB2)

⁶ See www.ecbproject.org for more details

12. Instilling in people the emotional intelligence and creativity so that they 'change' or understand change. Identifying EI in order to choose your change agents and collaborators. A competency solution.
13. Making people aware that there is so much 'change' in everyday work life (a 1-1 with manager, looking at a monthly management account) that the word change should not be used or would not be threatening when a 'big project' comes up. This could be illustrated by case studies of change at *all* levels.
14. Action learning sets
15. Talk about 'improvement' and not 'change' because it is familiar and mission-related
16. Talk about 'harnessing' people's creativity, EI etc. and not talking of projects, management etc.

Members of the ECB Project will discuss these suggestions with People In Aid and will also review what already exists in the sector before deciding which piece of work to take on. Once a decision has been made EPN participants will be notified.

Participants were then asked to take a couple of minutes to write down what they as an individual were going to do or take away with them from EPN Gatwick and to share their thoughts with the group. These included:

- Freshness and energy
- Build awareness at board level of need to underline the *purpose* elements in development and communication of strategy
- Challenge of transparency in an adaptation process
- For bigger organisational change: it is very important to prepare – to plan how to plan
- More time in building the case for change
- The concept that we are always adapting and have been and will have to otherwise we will not survive (and some practical tools to do this and manage change)
- Assessing our readiness for a change in a more structured way...using vision, competencies, incentives, resources, action planning approach
- Peer learning process
- HR can play a role in supporting an organisation's adaptation to change as well as individuals
- Now equipped with tools to understand the emotional mechanisms beyond change (7 dynamics of change, framework for understanding change), will try to apply them to myself and others to support the process
- Push for earlier HR involvement in change processes initiated by other departments/teams
- Change takes patience; Change takes engagement; Real change won't happen unless you win hearts and minds
- Find/devise activities to promote adaptability and awareness of the need to change
- Strengthening 'future leading' more than 'memory leading'
- Share knowledge and inspirations with colleagues and peers
- Develop storytelling skills
- Learning process/system to be expanded from lessons learnt to adaptation/adoption
- Integrate the idea of *adaptability* into the Management Centre's Change Toolbox
- The involvement of all the stakeholders on board before and during the change process
- Adaptability vs. Change: need to harness adaptability, not always focus on large change processes
- Review how we measure *impact*
- Better understand the need to pay attention to the emotional well-being of people through a change process

Reflections from the Conference

Paula Gay – Personnel Manager, British Red Cross

Paula led a session on reflections from the conference by giving an example of change which illustrated how she had learnt to accept a change process and why this had been a successful conference as a result: As a member of the EPN Steering Group Paula was heavily involved in deciding the theme of this year's EPN and was very proud of the topic when it was first chosen back in November 2008. However, when Vicky Cosstick joined the Steering Group and informed that a) there would be no tables at the conference but instead participants would sit in a horseshoe; b) there would be no big panel discussions; and c) that the first day would be spent taking part in a 'peer learning' process, in which participants would be divided into small groups and have just 6 minutes to share a workplace problem, AND that as a Steering Group member Paula would be facilitating one of these groups, she started questioning whether change was actually a good thing! After thinking it over and realising the irony of wanting Vicky to facilitate an EPN conference on change but not wanting to change the EPN conference Paula decided to instead embrace the change. Having taken part in what she now feels was an incredibly successful conference she is happy that she was brave enough to embark on the journey of change.

Paula also asked two participants to reflect and share their experience of the conference:

1. Liz Crawford – Field HR Coordinator, MSF UK

Liz found and truly appreciated the 'incredible openness' throughout the conference and the relaxed, friendly atmosphere. Whilst she did not come with any huge expectations she loved the peer learning session and enjoyed getting to know a small group of people well. She also feels this session set the tone for the rest of the conference.

The storytelling masterclass went down very well with Liz who liked being able to use her creativity. She now feels that when she is dealing with messy problems and big challenges she will not be quite as overwhelmed as she is equipped with tools to help her deal with these.

Liz felt that the group had been challenged on various concepts and fears about change and will take away the idea of 'adaptation' along with lots of other concrete ideas to put into practice.

2. Mohammed Radzi Jamaludin – Head of HR and Volunteer Management, MERCY Malaysia

Radzi described the conference as a very humbling experience and valued the opportunity to share, learn, challenge and affirm. He felt it was a privilege to be amongst so many HR practitioners and feels EPN is an incredibly useful tool. He is already looking forward to the next EPN!

'EPN Going Forward'

Jonathan Potter – Executive Director, People In Aid

Jonathan concluded the conference by reminding participants that this is not where EPN ends but that they can continue all the conversations they have started via EPN Online. He asked everyone to ensure they had completed their evaluation forms then thanked the steering group, all the speakers, Katja and of course Vicky Cosstick for all their time and effort.

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This opinion piece by Feinstein International Center Director Peter Walker, first delivered as a presentation to the 2008 meeting of the Global Humanitarian Platform in Geneva, introduces the issue of "accumulating adverse trends" with the aim of provoking discussion on how to better respond to the humanitarian challenges with which we are faced.
- Wheatley, Margaret J. (2006) *Leadership and the New Science: Discovering Order in a Chaotic World* Berrett-Koehler 3rd edition

Web Resources

www.acevo.org.uk

Creating change: Chief Executives on strategic planning captures chief executives' experiences, both good and bad, of leading strategic planning processes. Its intention is to serve as a useful introduction for chief executives, new or relatively new, to the process. The report is based on input from ACEVO members and other experts. Price: £15. Publication Date: 28.11.08

www.barefootguide.org

A free and practical, do-it-yourself guide for leaders and facilitators wanting to help organisations to function and to develop in more healthy, human and effective ways.

www.businessballs.com/changemanagement.htm

A simple guide to basic concepts and ideas.

www.cipd.co.uk/podcasts/articles/article3.htm?link=title

A free podcast from CIPD on managing change.

www.ecbproject.org

Emergency Capacity Building Project.

www.humanitarianfutures.org

Humanitarian Futures Programme.

www.managementcentre.co.uk

The Management Centre – various public access resources on organisational change.

www.peopleinaid.org/pool/files/publications/change-resources-gilliland-jud.pdf

A paper entitled 'How do you Introduce an Organisational Change?' By Bob Jud

EPN Online has, since the conference, continued to discuss many of the themes mentioned within EPN Gatwick and offers more resources to share. Join EPN Online on www.epn.peopleinaid.org or look at some recent threads on <http://www.epn.peopleinaid.org/messages.aspx>.